# Managing Offers

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## Recommending candidate for Hire:

When you completed interviews and are ready to recommend the top candidate for hire, you will need to update the candidate status to Recommended for Hire.

**Step 1:** Open the job requisition then select **View Applications**

**Step 2:** Click on the candidate's name

**Step 3:** In the Applications section, click on the recruitment status and change to **Recommended for Hire**

**Step 4:** Click **Next**

**Step 5:** Complete the status change by selecting **Move now**

This provides permission to move forward with the verbal contingent offer. However, the hiring manager may want to confirm with the Dean or VP office that the offer can move forward with the approved salary range.

## Accessing the Offer Card:

**Please refer to your College / Unit's protocol regarding verbal contingent offers and preparing the offer card before proceeding. The person responsible for this process will be the one which will complete the offer card.** (this may be the HR Liaison or Hiring Manager associated with the recruitment).

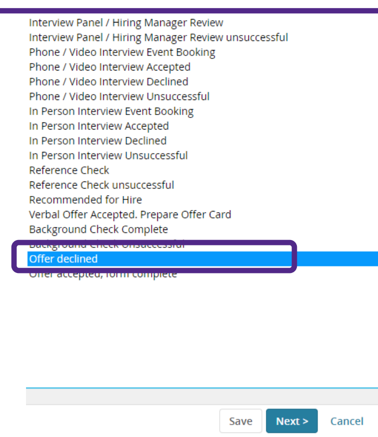
- **Step 1:** After conducting reference checks, the hiring manager can contact the candidate to make the **verbal contingent offer**.

**NOTE:** If during the **verbal contingent offer**, the candidate declines, the status for this individual needs to be updated to **Offer declined**.

a. Click **Next**. Allow the **Offer with Kansas State University has been Decline** email communication to be sent.

b. Indicate the **Offer decline reason.**

c. Click **Move Now.**



- **Step 2: AFTER** verbal contingent offer is **accepted and negotiations are set**, the status of the individual needs to be changed to **Verbal Offer Accepted. Prepare Offer Card.** This initiates the offer card.
- **Step 3: Select the individual which has accepted the verbal contingent offer.**
- **Step 4:** Click on the individual's name
- **Step 5:** In the Applications section, click on the recruitment status and change to **Verbal Offer Accepted. Prepare Offer Card**
- **Step 6:** Click **Next**
- **Step 7:** Complete the status change by selecting **Move now**

**** IMPORTANT MESSAGE ****

***Verbal Offer Accepted. Prepare Offer Card***
**is the LAST status you will change.**


# Preparing the Offer Card:

Fields from the **Job Requisition** and the **Applicant Card** will be pre-populate certain fields on the **Offer Card**.

## I. Offer Details

You will see the **Position no** and **Applicant's name**. In most situations, the Position no will already be marked for the individual. However, if there are several position numbers listed on the job requisition, you may need to change the position number to match the applicant. To do this, click on the appropriate position number and proceed with the offer card.

### a. Position Details

It is important to gather all of the details prior to starting the offer card. Fields noted by an **asterisk (*)** are required and will prevent the offer card from being saved.

- **Start Date –** this is the date which the hire will report to start their new position.
  - For a NEW hire, this date should reflect the actual date which the new hire reports for their first day of work.
  - For a current employee, the start date will be the first day of the pay period.
- **End date** - *For **Term** or **Temporary** positions. *This may not exceed 365 days from the start date.*

## b. Salary

- **Salary* and Rate Period** – the salary may need to be converted to Bi-weekly or Hourly pay rate in the **Salary*** field based on **position type** and **FLSA status**
- **Follow the guidelines** in the **Salary section** to determine how the pay should be shown in the **Salary field**
- **Rate Period** should accurately represent the correct position type and FLSA conversion.

## c. Pre-Employment Checks

Indicate if a background check is needed for the candidate by selecting the **Yes or No** option. To determine if a background screen is necessary, please view the Policy and Procedure Manual Chapter 4015.

1. **Background Screen** is required: Select the appropriate **background screen package**.

   **NOTE:** The **Core package** is the **Standard Background Check**.

   The **Core package** includes:

   - Criminal Search
   - Federal U.S. District Courts
   - SSN Trace
   - National Sex Offender Registry Search
   - National Criminal Background Search

2. **Background Screen** NOT required: Select the appropriate reason for not requesting a background screen. Talent Acquisition will verify the reason.

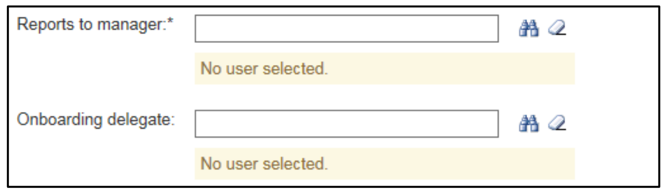
3. Indicate if this position requires a **drug screen**, and / or **physical**.

## d. Onboarding

1. Select the appropriate **Onboarding Form** and **Onboarding Workflow**.
   a. **Onboarding Form** consists of the required information needed from the hire

b. **Onboarding Workflows** determine the **New Hire Tasks** that are to be completed by the **Hire** (Employee) and by the **Reports to manager*** (typically the supervisor for the hire) and the **Onboarding delegate** (typically the HR Liaison

2. The **New Hire Tasks** for the **Reports to Manager*** and the HR Liaison (**Onboarding delegate**) will appear on that individual's dashboard.
   a. The **Reports to Manager*** (immediate supervisor for the employee). This is the person who is responsible for setting the stage and professional development of the employee.




   b. Select the Binoculars to confirm the email address
   c. The **Onboarding Delegate** is the individual who is responsible for the hire paperwork for the employee. In most cases, this will the HR Liaison in this role.
   d. Select the **Binoculars** to confirm the email address.

## Onboarding Workflows

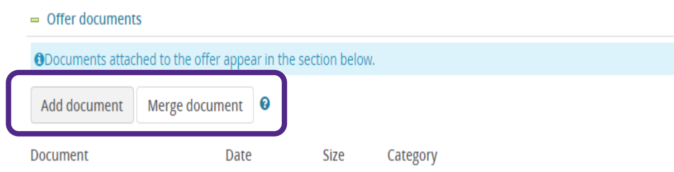
| Type of Hire | Onboarding Form | Onboarding Workflow |
|---|---|---|
| Faculty: New or rehire | Hire Form | Faculty - New or Rehire |
| Faculty Non-resident hire | Hire Form | Non-Resident Employee - Faculty |
| Faculty Hire from current temporary faculty | Hire Form | Temporary Hire to Unclassified (Reg/Term) position |
| Faculty Hire from current benefits eligible unclassified staff or faculty (Regular or Term) employee | Hire Form | Promotion / Transfer - Unclassified to Unclassified |
| Faculty Hire from GRA / GTA | Hire Form | Faculty - New or Rehire |
| Faculty Temporary Instructors | Hire Form | Temporary Instructors |

| Type of Hire | Onboarding Form | Onboarding Workflow |
|---|---|---|
| Unclassified New or rehire (Regular or Term) | Hire Form | Unclassified - New or Rehire |
| Unclassified Non-resident hire (Regular or Term) | Hire Form | Non-Resident Employee - Unclassified |
| Unclassified hire (Regular or Term) from GRA or GTA | Hire Form | Unclassified - New or Rehire |
| Unclassified hire from local agency (Regular or Term) | Hire Form | Unclassified - Local Agency or Agency Transfer |
| Unclassified hire from State of Kansas (SOK) agency (Regular or Term) | Hire Form | Unclassified - Local Agency or Agency Transfer |
| Unclassified hire (Regular or Term) from a Current Hourly student employee | Hire Form | Hourly Student to Unclassified |
| Unclassified Hire (Regular or Term) from a current benefits eligible unclassified employee | Hire Form | Promotion / Transfer - Unclassified to Unclassified |
| Unclassified Hire (Regular or Term) from current **Temporary** (non-benefits eligible) Unclassified or USS position employee | Hire Form | Temporary Hire to Unclassified (Reg/Term) Position |
| Unclassified Hire (Regular or Term) from current benefits eligible USS employee | Hire Form | Promotion / Transfer - USS to Unclassified |
| Unclassified Temporary:  New or rehire | Hire Form | Temporary Hire |
| Unclassified Temporary:  Non-resident hire | Hire Form | Temporary Hire - Non Resident Employee |
| Unclassified Temporary Hire from current Temporary Unclassified or USS employee | Hire Form | Temporary to Temporary |
| Unclassified Hire from Retiree rehire | Hire Form | Temporary Hire |
| Unclassified Temporary Hire from current benefits eligible unclassified employee | Hire Form | Temporary Hire |

| Type of Hire | Onboarding Form | Onboarding Workflow |
|---|---|---|
| USS New hire or rehire | Hire Form | USS - New or Rehire |
| USS Hire from GRA / GTA | Hire Form | USS - New or Rehire |
| USS Hire from current USS Limited Term employee | Hire Form | Promotion / Transfer – USS to USS |
| Police Officer | Hire Form | USS - New or Rehire |
| USS Hire from local agency | Hire Form | USS - Local Agency or Agency Transfer |
| USS Hire from SOK agency | Hire Form | USS - Local Agency or Agency Transfer |
| USS Hire from current USS employee | Hire Form | Promotion / Transfer – USS to USS |
| USS Hire from current hourly student | Hire Form | Hourly Student to University Support Staff |
| USS Hire from current Temporary USS employee | Hire Form | Temporary Hire to USS Position |
| USS Hire from current benefit eligible unclassified employee | Hire Form | Promotion / Transfer - Unclassified to USS |
| USS Non-resident hire | Hire Form | Non-Resident Employee - USS |
| USS Temporary New or rehire | Hire Form | Temporary Hire |
| USS Temporary from current benefits eligible USS employee | Hire Form | Temporary to Temporary |
| USS Hire from Retiree rehire | Hire Form | Temporary Hire |
| Type of Hire | Onboarding Form | Onboarding Workflow |
| **Non-University Students** | Hire Form | Non-University Student Hire |

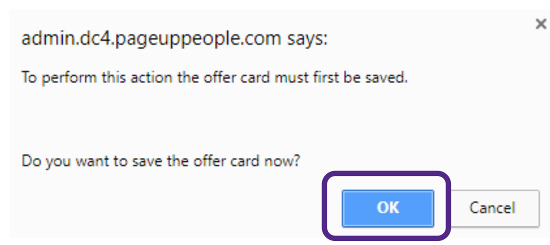
# II. Offer Documents

Within the **Offer documents** section, there are two options on how to create the offer documents which will send to the candidate through their applicant portal. These options are **Add document** and **Merge document.**




## a. Creating an auto-filled document

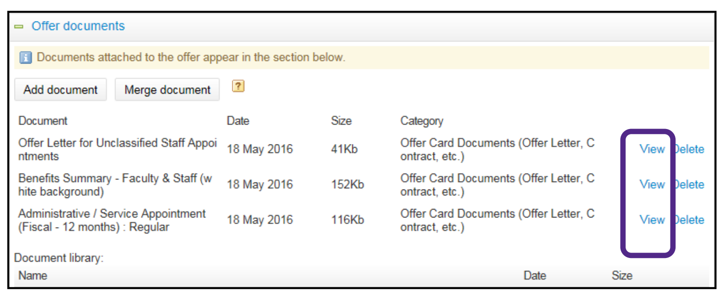
**Step 1:** Select **Merge document**. **Merge document** has been set up to merge data from the **PageUp** applicant tracking system into the offer letters and contracts to be created. **Note: you will not be able to select Merge document until all mandatory fields are completed.**




**Step 2:** Once you click **Merge document**, the system will ask if you want to save the offer card. Click **OK**.

**Step 3:** You will select the appropriate offer letter template and/or contract template. To select, place a check in the box in front of the appropriate selected document.

**Step 4:** Select **View** if you would like to see the document prior to selecting.




**Step 5:** Select **Merge** and information will populate in the document.

**Step 6:** Once merged, the document is attached to the **Offer Card** and ready for editing. To edit, click on **View** next to the document.

**Step 7: Review the merged document for accuracy.** Pay attention to the fields which are **highlighted in yellow**. These will need to be edited accordingly. Once editing has been completed, **remove the yellow highlight**.

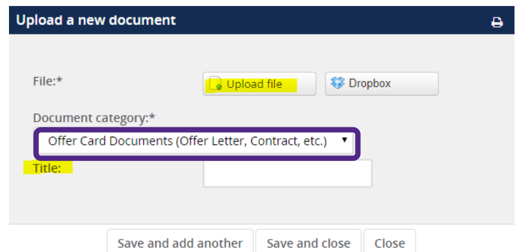
**Step 8:** Save the document to your desktop or to a file on your computer. **Save the document titled beginning with the individual's name and then the title of the document.**

*For example, Harry Hire is offered the position. You have just edited the initial appointment document and ready to save for upload. You will save on your desktop or computer file as **Harry Hire Initial Appointment**. For the offer letter, you would name it as **Harry Hire Offer Letter**.*

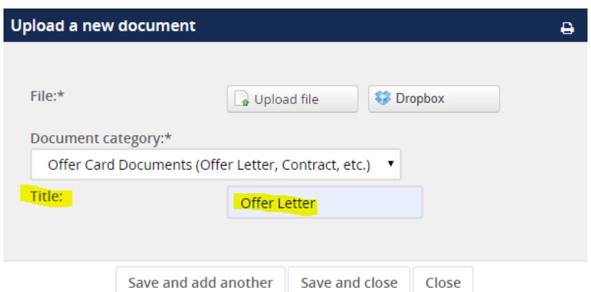
**Step 9:** Upload the final document into the offer card by clicking on **Add document.** This will prompt the *Upload a new document* window.

**Step 10:** Click **Upload file**. Locate the file on your computer.

**Step 11:** The **Document category** needs to be **Offer Card Documents (Offer Letter, Contract, etc.)**.




**Step 12:** Type **Offer Letter** or **Initial Appointment** (Depending on the document type) for the **Title**.




**Step 13:** Click **Save and add another** in order to upload the next document. **NOTE: If there is only one document, click Save and close.**

**Step 14:** Click **Save and close** once the final document is uploaded.

**Step 15:** Delete the original merged documents. The documents in the **Document** section will be the documents which will be reviewed by the approvers and seen by the candidate when reviewing the contingent offer.

## III. Approval Process

The **Approval process** is initiated when the offer is saved. All required fields must be completed. Select the appropriate approval process for your college from the drop down list. The selection will generate the fields to be populated for the appropriate individuals at each level. **NOTE: If you don't see the appropriate approval process for your college, contact your Talent Acquisition partner to set up the approval process.**

Each approver may fill in fields where any information is missing or documents for the hire. Once they approve the offer card, it is forwarded to the next approver.

### a. Submit the Offer Card

Before you start the offer card process, **review** the offer card to confirm all information is correct and completed. Click **Save and close**.

## Extending the offer:

The originator of the offer card will be notified when the final offer approval is completed.

**NOTE: Talent Acquisition will be responsible for changing statuses on the individuals who have had an offer card created for them from this point forward.** If you update the status on these individuals, this will negatively affect the individual's onboarding process.

When the new hire either accepts or declines the contingent offer, PageUp will automatically update the status in the system to **Offer accepted** or **Offer declined**.

After the contingent **offer is electronically accepted**, Talent Acquisition will initiate the background check (if applicable) and new hire will begin the electronic onboarding process.